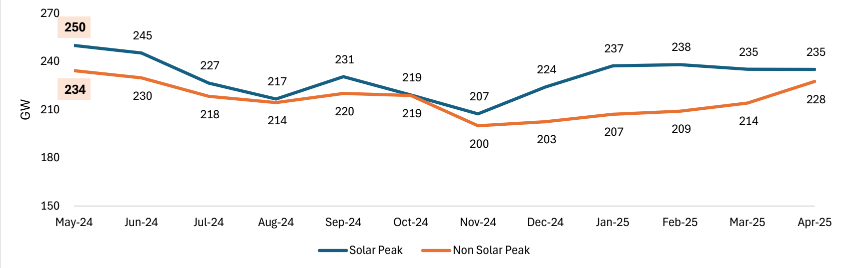
MONTHLY SNAPSHOT - INDIA POWER SECTOR : APRIL 2025

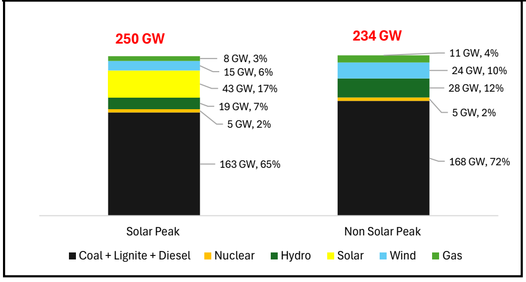
Power Foundation of India

Figure 1: PEAK DEMAND MONTHLY TREND



Note: 1) Solar Peak (235 GW) on 25th April 2025 @ 15:32 hrs
2) Non Solar Peak (228 GW) on 24th April 2025 @ 22:30 hrs
Source: Grid India

Figure 2: Source-wise contribution in Peak Demand [EFFECTIVE CAPACITIES]



Note: Contribution mix at the maximum Solar Peak and Non-Solar Peak recorded in the last 12 months; Source: Grid India

Table 1: INSTALLED CAPACITY (GW)

Source		2030 Target	Under Planning^	Under Construction*	Apr-25	Y-o-Y Growth
Fossil Sources		**277**	**52**	**32**	**240**	**-1%**
Thermal	Coal & Lignite	252	52	32	219	1%
	Diesel & Gas	25			21	-18%
Non-Fossil Sources		**482**	**115**	**165**	**232**	**16%**
Nuclear		15	7	7	9	7%
Hydro	Large	54	24	13	48	2%
	Small	5			5	2%
Solar	Ground Mounted Solar	293	84	79	82	27%
	Solar Rooftop				18	47%
	Hybrid Solar				3	12%
	Off-grid Solar/KUSUM				5	64%
Wind		100		26	51	11%
Other		15		39	12	6%
Total		**758**	**166**	**197**	**472**	**-26%**
Pumped Storage Plants		19	4	10	5	0%
Battery Energy Storage System (GW/GWh)		41.65/ 208.25		14.97/ 54.803	-	-

** As of March 2025; ^Estimated wherever actuals are not available*
Source: Central Electricity Authority; Ministry of New and Renewable Energy; Optimal Generation Mix Report ; Parliament Q&A

Table 2: MONTHLY GENERATION (BU)

Source		Apr-25	Y-o-Y Growth
Thermal		119	-4% ↓
Nuclear		5	11% ↑
Hydro	Large	10	18% ↑
	Small *	0.6	4% ↑
Solar *		15	24% ↑
Wind *		6	29% ↑
Other (Biomass, Bagasse) *		0.3	-87% ↓
Total		**156**	**0.5%** ↑

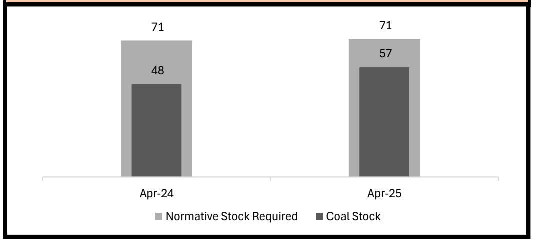
Source: Central Electricity Authority; Ministry of New and Renewable Energy

Table 3: TRANSMISSION INFRASTRUCTURE

Parameter		NEP Target (2032)	Under Planning^	Under Construction*	Apr-25	Y-o-Y Growth
Total Transmission Line Capacity (≥ 220 kV) ('000 ckm)		**648**	**7**	**51**	**495**	**2%**
	ISTS	295			214	2%
	InSTS	354			280	2%
Transformation capacity ('000 MVA)		**2,412**	**19**	**247**	**1,351**	**8%**
	ISTS	1,281			565	9%
	InSTS	1,131			786	7%
Inter-regional Trans. Capacity (GW)		**168**			**119**	**0%**

NEP: National Electricity Plan (Volume II) Transmission; Source: Central Electricity Authority

Figure 3: COAL STOCK (million metric tonnes)



Source: National Power Portal

KEY HIGHLIGHTS

1. The Government has launched the "*Green Hydrogen Certification Scheme of India*" to enable verified green hydrogen production under strict emission limits, through a BEE-accredited process. It aims to build a transparent, credible green hydrogen market aligned with the National Green Hydrogen Mission's 2030 decarbonization goals.

2. The Central Electricity Authority (CEA) has launched *STELLAR*, an indigenously developed resource adequacy planning tool to assist states and DISCOMs in optimizing power system expansion and ensuring grid reliability.

3. The Central Electricity Regulatory Commission (CERC) has directed power exchanges to standardize Term-Ahead Market (TAM) contracts by discontinuing user-defined time slots and adopting pre-specified slots such as Base/RTC, Peak, Off-Peak, and Night, as defined by the National Load Despatch Centre (NLDC), and align the delivery to be 2.5 hours ahead for the Intra-Day transactions.

4. FY 2023-24 True-Up issued for 16/36 States/UTs, FY 2025-26 ARR Order issued for 19/36 States/UTs:
(a) Jharkhand: 19% Tariff hike, increase in Energy Charges for all consumer categories except Agriculture and Street Lights, no change in Fixed Charges for any category.
(b) Bihar: no change in Tariff, Green tariff @ Rs. 0.42/kWh over and above applicable tariff, kVAh Tariff for Non-Domestic Consumers in place of kWh.
(c) Telangana: no change in Tariff, Contracted Load limit for LT EV Charging Stations increased from 56 kW/75 HP to 150 kW/ 201 HP.
(d) Himachal Pradesh: Rs. 0.12/kWh average reduction in Energy Charges, merged existing higher two Domestic Slabs into one.

[All data was last accessed on 26th May 2025]

** Generation through Renewable Energy (RE) sources is prepared from Cumulative Daily generation reports of April 2025 since Monthly RE generation report has yet not been uploaded on CEA website. SHP generation has been provisionally kept as per March 2025.*